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Tunisia

Grain and Feed

Official Grain Crop Estimate

2005

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Report Highlights:

The Tunisian Ministry of Agriculture estimates the 2005 cereal crop at nearly 2.1 million MT down from the previous year's estimate of 2.3 million MT.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Tunis [TS1]
[TS]

The Tunisian Ministry of Agriculture recently released the official crop estimate for winter wheat and barley, the two major cereals produced in Tunisia.

The MY 05/06 overall cereal crop harvested over the period June-August 2005, is officially pegged at nearly 2.1 MMT. This figure breaks down by major growing region (north, center and south) as well as by type of cereal as follows:

Cereal	MY	Seeded Area		Harvested Area		Output		Yield	
		North	Center & South	North	Center & South	North	Center & South	North	Center & South
Durum Wheat	MY04	501	380	482	343	1061.8	334.3	2.20	0.97
	MY05	504	309	498	189	1101.0	189.6	2.21	1.00
Soft Wheat	MY04	134	21	129	20	308.9	17.0	2.39	0.85
	MY05	130	18	129	11	324.6	11.6	2.52	1.05
Barley	MY04	223	379	214	346	331.3	286.3	1.55	0.83
	MY05	194	276	190	191	293.2	172.0	1.54	0.90
Total by region	MY04	858	780	825	709	1702.0	637.6	2.06	0.90
	MY05	828	603	817	391	1718.8	373.2	2.10	0.95
Overall total	MY04	1,638.0		1,534.0		2,339.6		1.53	
	MY05	1,431.0		1,208.0		2,092.0		1.73	
	Average MY 00-04	1,435.0		1,048.0		1,641.0		1.52	

Source: Tunisian Ministry of Agriculture.

Units: Seeded and harvested areas: 1000 ha; Output: 1000 MT; Yield (output/harvested area): MT/ha

Overall plantings decreased noticeably compared to the preceding growing season. The country's center and south regions, having experienced rainfall shortages, accounts for the bulk of this drop. Conversely, rainfall recorded in the northern growing region throughout the entire season was timely and abundant.

The grain output recorded in the northern region edged up as it was driven by better yields.

Countrywise, the output is significantly down from the previous year's level but still above the 5-year average (MY 2000-MY 2004).

Post estimate relating to MY 05 wheat imports is maintained. Around 900,000 MT of soft wheat are expected to be imported (a figure close to what was reported in MY 04) as both production and consumption levels are fairly steady year on year. In addition, Post maintains its estimate for durum imports. Those imports are expected to be minimal (at around 100,000 MT) mainly driven by private toll milling operations for re-exports.

Prospects for U.S.-origin wheat and barley shipments into Tunisia are tightly related to price as the Tunisian Office of Cereals, the GOT purchasing agency, pursues a procurement strategy based on international tenders favoring the lowest bidder. At this stage, Post has no reason to alter previous forecasts.

As for planting for the upcoming growing season, rainfall occurring during seedbed preparations in October and early November is determinant. In general, seeded area can vary about 15 percent up or down an average of nearly 1,400 hectares depending on rainfall.

All in all, Post believes that it is premature to alter wheat and barley PSDs submitted in the last Grain and feed report (#TS 5004). In the past, official production estimates proved to be sometimes overstated and, in retrospect, non-corroborated by actual imports.